

**Knowledge Transfer Plan/Schedule**

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Job Title: **Systems Analyst**

Manager: **Mark Price**

Last Day with Department: **04/06/2018**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Project/Task** | **Status of Project/Task** | **Time Line for Delivery** | **Assigned To** | **Location of Working Files** | **Comments** |
| Agent/Broker Load | Ongoing | 04/03/2018 | Sandhya | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Scripting\UFT\Scripts\HCBO_834_Agent_Data_Pull_V1.0\Datatables) * [Reports](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\Prod_Agent_Data) * [Notes](#_Agent/Broker_Load_Process:) | Sandhya is the Owner of this task. She might need help with UFT scripts. |
| SSN Xwalk Error Process | Ongoing | 04/03/2018 | Tim | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\XWalk%20Errors) * [Notes](#_SSN_Xwalk_Error) | Tim is the owner of this process. |
| SSN RI (EMM-564) | SIT Complete | 04/03/2018 | Tim | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\18341%20SSN%20RI) * [Notes](#_SSN_Replacement_Initiative) | No open issues at this point. |
| HIX/RCNI Projects | No current activities | 04/02/2018 | Erik, Lokesh | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\AffordableCareAct-Exchange\CMS%20Membership%20Reconciliation\Java%20Solution\Kumar\HIX%20-%20RCNI%20Projects\Meeting%20Recordings) | Met with Erik, Lokesh, Kathy & Nick to discuss on projects. |
| CMS SHOP Recon Process | Ongoing | 04/03/2018 | Lokesh | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\AffordableCareAct-Exchange\CMS%20Membership%20Reconciliation\Java%20Solution\Final_Versions\SHOP_2015) * [Notes](#_CMS_SHOP_RCNI) | Standard Recon Process Like IBU |
| UFT Scripts | Ongoing | 04/03/2018 | Brandon | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Scripting\UFT\Scripts\HCBO_834_Agent_Data_Pull_V1.0\Datatables) * [Notes](#_UFT_Scripts:) | Meeting with Brandon & Lokesh next week to go over all scripts. |
| NCompass Data Support | Ad-hoc | 04/03/2018 | Nick | * [JCL Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\JCL) * [Other](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\NCompass) Docs * [Notes](#_NCompass_Data_Support:) | Nick can handle Ad-hoc requests |
| MediGap 834 Tool Creation | Ongoing | 04/03/2018 | Atul | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\Medigap) * [Notes](#_MediGap_834_Tool) | Atul can help with this. |
| RMA Enrollment Errors Review | Ongoing | 04/03/2018 | Tom | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\RMA) | Tom can help with this. |
| 834 Support | Ongoing | 04/03/2018 | Atul/Sandhya | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\834) | Atul/Sandhya can help with this. |
| CMS MSP NMSP File Process | Ongoing | 03/29/2018 | Sandhya | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\TESTING\Test%20Execution\MI172052) | Atul/me testing this project in Sandhya’s absence. |
| Tools/Macros | Ad-hoc | 04/05/2018 | Team | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\Tools) * [Notes](#_Tools/Macros:) | -- |
| Open Defects | Ad-hoc | 04/05/2018 | Team | * N/A | No outstanding open defects. |
| Documenting RFT Regression Macro Work Flow | N/A | 04/05/2018 | Brandon | * [Share Path](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\Regression%20Macro%20Flow) | Started creating a document, but there’re many issues blocking the key functionalities in the tool to derive documentation. |
| 1K File/ MBDAP Compare | -- | 04/05/2018 | Atul | * [Notes](#_1K/MBDAP_Compare:) | Please refer notes. |

# **Agent/Broker Load:**

**Complexity: Medium**

**Action Items / Tasks**:

* Agent/Broker related errors from ZRON need to be processed in regular intervals. Currently errors accumulated for complete month are processed at the end.
* Please follow below steps:
  + Extract ZRON reports from EOS portal
  + Consolidate errors and filter contract specific errors
  + Extract agent information for the contracts from HCBO using UFT script (*HCBO\_834\_Agent\_Data\_Pull\_V1.0*)
  + Extract extents for the contracts using Contract, Group and Division. UFT Script - *MWC\_Contract\_Extent\_Extract\_V1.0*
  + Load Agent information in MWC. UFT Script - MWC\_Agent\_Load\_NewVersion\_V3.x
  + Please make manual updates wherever required and store all artifacts at a defined place
* If the contract is incomplete/terminated

**Artifacts Location**:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Scripting\UFT\Scripts\HCBO\_834\_Agent\_Data\_Pull\_V1.0\Datatables](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Scripting\UFT\Scripts\HCBO_834_Agent_Data_Pull_V1.0\Datatables)

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Auto\_Enrollment\_Reports\Kumar\Prod\_Agent\_Data](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\Prod_Agent_Data)

**Recommendations:**

* Please have a special attention on overlap errors in the report. There’re several defects around this area in the past.
* Every step is almost automated to make the process easy and quick. Please follow the same.

# **SSN Xwalk Error Process:**

**Complexity: Low**

**Action Items / Tasks**:

* Extracting SSN Xwalk errors from ZROS (Exchange) & ZROV (Historical) reports
* Different conditions to be applied based on SSN number
  + **ZROS**:
    - If the SSN starts with 77 or higher, request to delete the record from the report
    - If the number is below 77, then need to check local (IMS) for AGID
      * If the AGID exists, then process the record to add in the system
      * If the AGID not exists, request to override the record
  + **ZROV**:
    - If the SSN starts with 77 or higher, request to delete record from the report
    - If the number is below 77, then need to check local (IMS) for AGID
      * If the AGID exists, then process the record to add in the system
      * If the AGID not exists, then request NASCO to remove the record from the report and request AGR to load the contract manually.
      * For any action on ZROV, sending information to AGR is highly recommended.
* Sample CSR for base template: MI180510
* There’re three different sections in this document to update appropriately.
* Date of process (Current Date) need to be mentioned at three different places in the CSR
* Once updated, move the CSR to MBR1 and send a mail to NASCO to act suitably.
* Verify the reports on the next day to make sure requested actions were accomplished.

**Artifacts Location**:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Auto\_Enrollment\_Reports\XWalk Errors](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\XWalk%20Errors)

**Recommendations:**

* This should go in a daily frequency. Errors from ZROV (Historical) should be processed with more priority.
* Tom/Tim can help getting AGID for the Xwalk errors

# **SSN Replacement Initiative (MBI Project):**

**Complexity: High**

**Action Items / Tasks**:

* Text execution is complete and ITTO may need further support for data creation using UFT scripts
* Test scenarios/cases, data mapping sheets, 834 files are placed in the below mentioned location
* Random MBI generation tool also included in the same path
* UFT script designed to validate MTV/MWC test cases
  + MTV\_ADD\_Medicare\_SSNRI\_Testing
  + MWC\_ADD\_Medicare\_SSNRI\_Testing
* We ran thousands of field level validations to make sure MBI/HICN/RRB is getting accepted as expected.
* CQ 71182 / ent00165755 was opened due to an issue, but approved at a later point of time as the defect has minor impact.

**Artifacts Location**:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Auto\_Enrollment\_Reports\Kumar\18341 SSN RI](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\18341%20SSN%20RI)

**Recommendations:**

* Please see Tim for any questions related to SSN RI project. Sandhya may help with CMS MSP/NMSP process.

# **CMS SHOP RCNI Creation:**

**Complexity: Low**

**Action Items / Tasks**:

* This new process of generating SHOP RCNI file is effective from Feb-2017 for reporting month Jan-2017 onwards. With the new process, we’ll create SRCNI extracts for previous plan year as well as current plan year to report CMS with accurate active membership as of reporting month.
* NASCO (Chris) provides the input file with all DAMs (Division Anniversary Months)
* Split the input file into two different files based on the calendar Month
  + If the input file is for Feb-2017 (Membership active as of Jan-17), then
    - Split the file in such a way that one file has DAMs 1-2 and another file has DAMs 3-12.
    - File with DAMs (1-2) will be considered for Current Plan Year 2017 (Configuration: Plan\_Year = 2018 & PLAN\_MONTH=02)
    - File with DAMs (3-12) will be considered for Previous Plan Year 2016 (Configuration: Plan\_Year = 2017 & PLAN\_MONTH=12)
* Run the Java solution on individual files with given configuration. File path/name, plan year and plan month properties should be changed appropriately.
* Concatenate the reports and remove duplicate headers/trailers
* Correct the entries in the trailer record from the full file
* Issuer Assigned Tracer Number should be sequenced
* Remove the header and create a CSV file.
* Extra Pipe characters need to be removed from the trailer record
* This is a monthly RCNI generation activity.

**Artifacts Location**:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\AffordableCareAct-Exchange\CMS Membership Reconciliation\Java Solution\Final\_Versions\SHOP\_2015](file:///\\pna434h0360\40740_Meta_Vance_Systems\AffordableCareAct-Exchange\CMS%20Membership%20Reconciliation\Java%20Solution\Final_Versions\SHOP_2015)

**Recommendations:**

* Please follow the steps as mentioned above in every month. There’s a document located in the share path for a better understanding.
* No enhancements/issues identified with this process.
* We may end SHOP Recon generation at the end of 2018.

# **UFT Scripts:**

**Complexity: Medium**

**Action Items / Tasks**:

* Daily UFT Scripts:
  + ASC Payment Processing:
    - Script Name: MTV\_CashReceiptBatch\_ASCGroup\_V1.0
    - Extract payments information from scripting mailbox
    - Run the script and share the results
* Ad hoc Scripts:
  + New Contracts Creation
  + Void/Termination Scripts
  + HCBO Agent Extract
  + MWC Agent Load etc.
* There’re plenty of other scripts which we may need to deal with ad-hoc behavior.
* There’s a scope for enhancing few old scripts if we want to run them again
* All scripts are available in the below mentioned share path and ready to use.

**Artifacts Location**:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Scripting\UFT\Scripts](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Scripting\UFT\Scripts)

**Recommendations:**

* Please consider the latest script all the times and have a sanity check in MO/U30
* Most of the errors are due to the data sheets. Please focus on data tables and format/position of the fields

# **NCompass Data Support:**

**Complexity: Medium**

**Action Items / Tasks**:

* We support NCompass testing team for their various needs through their testing
* Various JCLs are used to pull required information from SMR/GMR/MBDAP
* We’ll also make use of UFT scripts if we would like to create data based on the demand
* Testing team may request Model Office data to be in sync with PROD data.

**Artifacts Location**:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Auto\_Enrollment\_Reports\Kumar\NCompass](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\NCompass)

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Auto\_Enrollment\_Reports\Kumar\JCL](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\JCL)

**Recommendations:**

* It’s good to have required approvals before loading PROD data in Model Office
* Please refer to the old data elements if they are useful for new requests

# **MediGap 834 Tool Creation:**

**Complexity: Low**

**Action Items / Tasks**:

* Created a macro to generate 834 transactions by feeding data in spreadsheet
* Steps to follow:
  + Please request Chris to get the latest MediGap dependents information
  + Feed the data to the tool in the respective columns
  + Mandatory fields should be provided to create a valid 834 files
  + Run the macro and save 834 transactions
* Make use of 834 compliance check macro to understand any issues with generated transactions

**Artifacts Location**:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Auto\_Enrollment\_Reports\Kumar\Medigap](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\Medigap)

**Recommendations:**

* Data feed should be accurate and data should be required for all mandatory fields
* Please try with 5-10 transactions in the initial run

# **Tools/Macros:**

**Complexity: Low**

**Action Items / Tasks**:

* EDI\_834\_BasicComplianceValidation\_Tool\_V2.0 – Compliance check tool to minimize 834 errors before submission.
* MSP\_NMSP\_FileCreation\_Macro – Creates MSP and NMSP flat files accurately and easy to use.
* Unique MBI Generator Tool V1.0– MBI number generator
* Split\_The File – This is helpful to split large text files into smaller pieces
* ZRAC\_ZRLD\_AutoEnrollment\_AlignErrors – Helpful in aligning BMI error reports
* CompareXLs – Helpful in comparing two different excels at one time
* Multiple\_Sheets\_Into\_One – Tiny tool to merge all excel tabs into one
* ClaimLoader\_Macro – Used to create claims for billing regression testing
* BumpResults\_Consolidator\_Tool\_V2 – Used in BB team for consolidating bump results
* BAA Report Examiner\_V1.0 – This is helpful to extract data from BAA XML files
* PIN\_Tool\_V1.0 – Negative scripting tool. Please refer PIN snapshot PPT.
* Recall\_Prod\_834\_V1.1 – Mainframes macro to recall or mail datasets
* ADCT- Advanced Data Comparison Tool – Used to compare data among multiple sheets
* Group Account Control Sheet – Used to format BB account sheet information

**Artifacts Location**:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Auto\_Enrollment\_Reports\Kumar\834](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\834)

**Recommendations:**

* Macros are helpful in minimizing manual work. Please make use of existing macros and try creating new ones using the available tools.
* Please refer to below location for helpful material:

[\\pna434h0360\40740\_Meta\_Vance\_Systems\MetaVance\Auto\_Enrollment\_Reports\Kumar\Tools\VB Macros-Share](file:///\\pna434h0360\40740_Meta_Vance_Systems\MetaVance\Auto_Enrollment_Reports\Kumar\Tools\VB%20Macros-Share)

# **1K/MBDAP Compare:**

**Complexity: Medium**

**Planned Steps**:

* Atul and Kumar submitted access requests to 1K files. We’re yet to get full access.
* Our plan is to add ‘ID Form’ and ‘Bottom MSG’ on 1K Change file and MBDAP for running comparison
* Atul will run JCLs to derive changes.
* Created a script (*MTV\_IDCard\_Compare & Request\_V1.0*) to compare existing ID card requests and submit a new one if there’s no relevant requests found.
* Brandon will execute this script in my absence.

**Artifacts Location**:

N/A